Anchor Financial Reporting

Thank You for Attending this **Results** Zoom Meeting Live Today and Library Content Soon Powered by YOU NET RESULTS **Continuing Anchor Financial Thinking Anchor Financial is a Process....** When Utilizing YOU TOOLS

Anchor Financial Reporting

You Net Results **Premier** Automotive Guide Brian Gillis



Anchor Financial Reporting

About Brian Gillis...

- 25 Plus Years operating auto repair shops in Texas, Georgia and Colorado, multi unit stores
- Hired and Trained over 2000 staff members
- Budgeting and Profits Brian's Specialty
- Smooth as silk with customers
- Polished and Professional
- Seasoned Automotive Veteran
- Owner and Founder of YOU NET RESULTS



Anchor Financial Process

YOU **TOOLS.. Confidence** COACHING GROUPS BUILD CONFIDENT in Financial Areas for Auto Repair Shop Owners and Staff

- Define confidence in you own words
- What do you have to do to become a confident leader?
- What does each of your staff members need to do to become confident?

Anchor Financial Process

YOU TOOLS.. Why? Results Mantra

At **You Net Results**, we facilitate **coaching groups** for auto repair shop owners, so you <u>reach</u> a **turnaround point** where you <u>emerge</u> from the experience moving from a **business owner** to a **confident business leader** <u>eliminating</u> your **silent thieves**.

> Reaching your turnaround point <u>Emerging</u> from your experience <u>Eliminating</u> your silent thieves Reaching – Emerging – Eliminating

Anchor Financial Process

Mastering Your Results Powered by **YNR BIG THREE: 1:** Counter **2**: Staffing **3**: Operations **Brian's Know-How and Experiential SIX** 1. LD-YNR – 0100 - Leadership Process 2. MG-YNR – 0200 - Management Process 3. GM-YNR – 0300 - General Manager Process 4. FP-YNR – 0400 - Financial Process 5. DO-YNR – 0500 - Daily Operations Process 6. PP-YNR – 0600 - People Process

Anchor Financial Reporting

YOU TOOLS.. Silent Thief

- How long are you going to let *Silent Thieves* rob your automotive repair shop? With **Poor**:
- Leadership and Management Processes
- Front Counter Processes *How-to Manual
- People Staffing Processes *Daily Operations
- Financial Processes
- > Do **YOU** need to stop the theft of your future?
- Are YOU willing to do what it takes? If YOU don't fix the silent theft – YOU might as well put the key under the door...and not come back tomorrow!



Anchor Financial Reporting

Many have discovered in the past...

- Anchor Financial Reporting can be a process!
- Anchor Financial Reporting can be <u>learned</u>!
- Anchor Financial Reporting can be <u>taught</u>!
- Anchor Financial Reporting can be "<u>FUN</u>"!
- Anchor Financial Reporting can be <u>systemic</u>!

Anchor Financial Reporting

YOU **TOOLS**

- Processes and Systems run your business... written or unwritten
- People run the Processes and Systems
- Making your business process and systems dependent - Not people dependent - Is the major objective of the Manager

Anchor Financial Process

What are? Anchor Financial YOU TOOLS

- They are built for YOUR NET RESULTS
- Designed to help YOU be in Process
- TAP Turnaround Point Book...Gary Gunn's Voice in Print and Audio
- Moving from business owner to business manager (BO to BM)
- Anchor Financial Silver Bullets do not exist

Anchor Financial Process

YOU **TOOLS**

- YOUR Monthly Reporting Template
- Filled out manually by YOU the owner
- It is not automated for several reason
- > You need to know how-to find all the numbers
- Answer any questions from others
- Never say I don't know because I did not do this report myself

YOU NET RESULTS Anchor Financial Process YOU **TOOLS**

It's easy to build Your TEN Anchor Financial Process but it's easy not to!

How-to build Your TEN Anchor Financial Process
6 Steps
1. Thinking 2. Words 3. Action
4. Habits 5. Perseverance 6. Attainment





- What would it take to move up the scale?
- What will you do tomorrow?
- What will you start doing?
- What will you stop doing?

よ *Anchor Financial Process*

YOU TOOLS TEN Anchor Financial Tools Connecting the DOTS

- 1. Your P&L
- 2. Your Balance Sheet
- 3. Your POS Reports
- 4. Snapshot Spreadsheet
- 5. Budgeting for Profit Spreadsheet
- 6. Trending Spreadsheet
- 7. Your Bank Statements
- 8. Anchor Financial Report (MTD & Monthly)
- 9. ScoreCARD
- 10. Financial Now When Exit Recipes LD-YNR – 0119 – SOP - Now Recipe LD-YNR – 0120 – SOP – When Recipe LD-YNR – 0121 – SOP – Exit Recipe

Anchor Financial Process

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YOU TOOLS.. Agenda for 12.14.21

Brian's Know-How and Experiential SOP Review and Update and Formation

- 2021 Version of Monthly Reporting Template (Excel)
- 2021 Version of Financial Reporting Format (Word)
- Most Current Month 2021 Anchor Report Review using SOP 407
- 0407-SOP–Overall Anchor Financial Report
- 0407-1-SOP Sawtooth Page YTD and Monthly
- 0407-2-SOP Summary of Cost Page 6 YTD and Monthly Page 16 Page 6 – One Things Exercise
- 0407-2-1-SOP-Anchor Low Hanging Fruit Exercise Template_YNR
- 0407-3-SOP Financial YOUTOOLS Review (covered 6.8.21)
- 0407-4-SOP Collateral Damage & Repair & Consequences (covered 7.13.21)
- Show and Share Anchor Library Documents to Download

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YOU TOOLS.. Agenda for 12.14.21

Brian's Know-How and Experiential SOP Review and Update and Formation

- **30k GP \$** challenge to increase during the last 6 months of 2021
- 0402-SOP Budgeting for Profit Spreadsheet (How-to use it)
- 0402-1-SOP-TCODB / METER (True Cost of Doing Business)(Covered 7.7.2020)
- 0402-2-SOP-TNP (True Net Profit)
- 0402-3-SOP-Stacking Up Cash Building Working Capital and Reserve
- 0402–4-SOP-Chasing Dollars vs. Dimes
- 0402–5-SOP-Budget Goals (Covered 12.14.21)
- 0403-SOP Snapshot
- 0404-SOP Trending Tool
- 0407-5-SOP-Would you pay 50K for a Technician?
- 0407-6-SOP-Career Path for Service Advisor
- 0410-SOP-ScoreCARD how-to

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• **30k GP \$** challenge to increase during the last 6 months of 2021



- As we talked about the 30k Challenge is to increase by 30k during the last 6 months your GP dollars without raising prices. Then share 25% or more with your team. Involve your team in the ways this can be accomplished.
- Plus see attached file for the 50k SOP 407-5, fill out your strategies, and be ready to present your completed SOP 9/14 during our Anchor Meeting.
- 30k Challenge and 50k (SOP 407-5) Technician recruiting plan.
- Let's BLOW Brian away with our collective 50k SOP.





Anchor Financial Process よ

Tip Toe Bandit

Sneaky Pete





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YOU TOOLS.. Agenda for 12.8.20

 0409–SOP-A Methodical Set of Questions - FINANCIAL STATEMENT ANALYSIS - Questions to ask and Observations to make

Gap Calculation

- Write down your average monthly net profit for the last 12 months.
 \$_____
- Write down what you want your average net income to be.
- The gap between where you are and where you want to be is.
- You're paying a cost of \$_ don't solve this problem.

every month you

Anchor Financial Process

YOU TOOLS.. Agenda for 12.8.20

 0409–SOP-A Methodical Set of Questions - FINANCIAL STATEMENT ANALYSIS - Questions to ask and Observations to make

Gap Calculation

- Write down your average monthly net profit for the last 12 months.
 \$_____
- Write down what you want your average net income to be.
- The gap between where you are and where you want to be is.
- You're paying a cost of don't solve this problem. How do you fix this?

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YOU TOOLS.. Agenda for 1.12.21

 0409–SOP-A Methodical Set of Questions - FINANCIAL STATEMENT ANALYSIS - Questions to ask and Observations to make

Gap Calculation Review on 1.12.21

- Write down your average monthly net profit for the last 12 months.
 \$_____
- Write down what you want your average net income to be.
- The gap between where you are and where you want to be is.
- You're paying a cost of don't solve this problem. How do you fix this?